

## HEADSPACE

## 1 CENTER YOURSELF AND CLARIFY REALITY

### PAUSE → BREATHE → REFLECT

**If strong emotions are present, check in with yourself to understand what's shaping your reaction. Let these questions help you clarify what's happening inside you.**

- What part of my emotional response is grounded in facts, and what part might be interpretation?
- Am I making assumptions or filling in blanks with information that may not be accurate?
- Am I taking anything personally, or making something personal that isn't? If so, why?
- Are past experiences coloring my ability to think clearly, stay objective, and focus on the facts of the present situation?
- Am I overstating any fears and allowing them to distort my perception of reality?  
*(fear of harm, loss, rejection, exclusion, or desperation)*
- Am I engaging in any irrational or self-protective narratives that are distorting my view of the situation, minimizing my own role, influence, or responsibility, and undermining my ability to think clearly, stay composed, and engage effectively?

#### FOOL'S CHOICE

*"I can't be honest and maintain the relationship."*

**Framing the situation as an either/or when a both/and solution is possible.** You assume you must choose between two undesirable extremes instead of exploring a balanced, skillful middle path.

#### VICTIM STORY

*"It's not my fault."*

**Minimizing or ignoring your own contribution to the problem.**

You cast yourself as the innocent party to avoid discomfort, accountability, or self-examination.

#### VILLAIN STORY

*"It's all their fault."*

**Exaggerating the other person's flaws, motives, or incompetence.**

You assume the worst about them while overlooking their possible good intentions, pressures, or limitations.

#### INADEQUATE / IMPOSTER STORY

*"It's all my fault."*

**Over-owning responsibility due to self-doubt or imposter feelings.** You inflate your shortcomings and assume you're the sole cause of the problem, even when the situation is shared or complex.

#### HELPLESS STORY

*"There's nothing I can do."*

**Believing you have no influence or options.** You convince yourself you're powerless, which prevents you from seeing the choices, boundaries, or actions available to you.

**With mental maturity and genuine empathy, step outside your own perspective and explore the situation through the experiences of others. Consider:**

**What impact is this situation having, or is likely to have, on others involved?**

**Make sure you're gathering all the FACTS with a full awareness and understanding of the following categories:**

- ✓ **Known Knowns** Facts you are fully aware of and confident are true.
- ✓ **Interpretive Data** Assumptions, interpretations, opinions, speculation, fears, and concerns. These are not facts, but they influence your thinking and should be acknowledged, not treated as truth.
- ✓ **Known Unknowns** Information you know you don't yet have. You may need to seek out the missing data, make a well-informed estimate, or avoid filling in the gaps with assumptions.
- ✓ **Unknown Unknowns** Factors you don't yet know that you don't know (your "Black Swans"). Stay open to the possibility that additional variables or perspectives may emerge.

## PURPOSE

## 2 CHECK YOUR MOTIVES AND ALIGN YOUR INTENTIONS

**As you consider how to approach this conversation, stay focused on what matters most and let that clarity guide your decisions and behavior.**

In difficult conversations, your **behavior will always reflect your motives**. Use the questions below to **ensure your motives haven't slipped into unproductive agendas**, such as winning, punishing, keeping the peace, or teaching a lesson that can derail a constructive dialogue.

**1**

### WHAT OUTCOME AM I SEEKING?

*What do I ultimately want to accomplish?*

**2**

### WHAT DO I WANT FOR:

- *myself?*
- *the other person?*
- *the relationship?*
- *the organization?*

**3**

### WHY IS THIS CONVERSATION NECESSARY?

*What value will it create for me, my team, and the organization if it goes well?*

**4**

### IF I TRULY WANTED THESE RESULTS, HOW WOULD I THINK AND BEHAVE DURING THIS CONVERSATION?

*Who do I want to be in this moment?  
How would the version of me that I'm becoming handle this?*

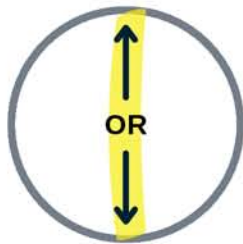
## STRATEGY

# 3 PLAN YOUR APPROACH WITH INTENTION AND CARE

After deciding who should be included in the discussion, use your experience with each person to clarify their preferred communication and engagement style.

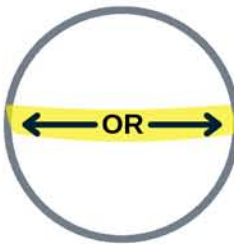
- 1 Consider whether this person tends to be more:
- 2 Then, consider whether this person also tends to be more:
- 3 Now, combine this person's tendencies to determine their DiSC Style.

FAST-PACED & OUTSPOKEN

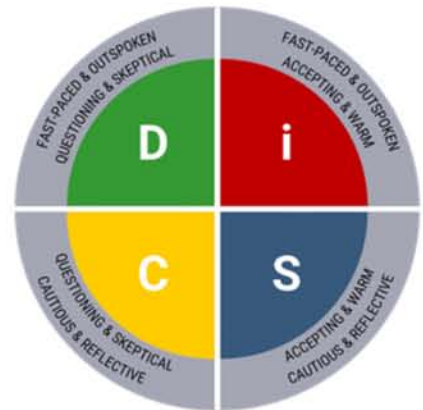


CAUTIOUS & REFLECTIVE

QUESTIONING & SKEPTICAL



ACCEPTING & WARM



### DOMINANCE

#### PRIORITIES

- results
- action
- challenge

#### FEARS

- failure
- appearing weak
- being taken advantage of

#### DEFAULT STYLE

- pushes for results
- shows decisiveness
- displays confidence
- conveys urgency
- speaks up about problems

#### BOTHERED BY

- wasted time
- small talk
- too many details
- indecisiveness
- lack of control
- challenges to authority

### INFLUENCE

#### PRIORITIES

- enthusiasm
- action
- collaboration

#### FEARS

- rejection
- criticism
- being ignored

#### DEFAULT STYLE

- generates enthusiasm
- creates a lively environment
- eager to get things moving
- gets everyone involved
- connects well with others

#### BOTHERED BY

- dull or dry analysis
- too many details
- cold or detached people
- loss of approval
- negativity or pessimism

### CONSCIENTIOUSNESS

#### PRIORITIES

- accuracy
- stability
- challenge

#### FEARS

- being wrong
- low quality / inaccuracies
- emotional outbursts

#### DEFAULT STYLE

- strives for reliability
- ensures accuracy
- provides logical analysis
- thoroughly questions ideas
- maintains high standards

#### BOTHERED BY

- emotional or illogical people
- personal questions
- overly enthusiastic presentations
- pressure
- emotional appeals

### STEADINESS

#### PRIORITIES

- support
- stability
- collaboration

#### FEARS

- rapid change
- upsetting others
- loss of harmony

#### BOTHERED BY

- high pressure
- sudden change
- pushy people
- uncertainty
- unpredictability
- conflict

#### DEFAULT STYLE

- team player
- listens and provides support
- patient, calm, and tactful
- accommodating of different people and ideas
- strong pulse on team engagement and dynamics

Using the information below and from the previous page, consider how you might adjust your approach to engage more effectively in this conversation.

## INTERACTING WITH THE DOMINANT STYLE

### When Trying to Connect:

Make efficient use of time, get right to the point, expect candor

### Strategies:

- Use a confident and no-nonsense approach
- Get to the point
- Give them options and a sense of control
- Convey respect for their authority
- Show a desire to help them get immediate results

### Emphasize:

- Immediate outcomes
- The bottom line
- Efficiency, ease of use
- Profits, savings

### When Problems Need to be Solved:

Tackle problems boldly, avoid sugar-coating and over-analysis

### When Things Get Tense:

Face issues quickly and directly, avoid taking bluntness personally

## INTERACTING WITH THE INFLUENCE STYLE

### When Trying to Connect:

Convey enthusiasm, make a personal connection, be collaborative

### Strategies:

- Use an upbeat and lively approach
- Give them a chance to tell their stories
- Be open to disclosing information about yourself
- Show empathy for their concerns
- Demonstrate how your offering helps other people

### Emphasize:

- Testimonials
- Ease of use
- Exciting opportunities
- How your offering makes them look good

### When Problems Need to be Solved:

Remain optimistic, be open to change, expect spontaneity

### When Things Get Tense:

Stay calm, acknowledge their feelings, avoid personal attacks

## INTERACTING WITH THE CONSCIENTIOUSNESS STYLE

### When Trying to Connect:

Focus on the facts, avoid pushing them, expect skepticism

### Strategies:

- Use an objective approach
- Slow down and discuss the details
- Have evidence to back up your claims
- Use logic to connect solutions to their problems
- Give them a chance to show their knowledge

### Emphasize:

- Quality, high standards
- Your expertise
- Logical reasons
- Evidence of reliability

### When Problems Need to be Solved:

Show appreciation for their logic, but don't let them get bogged down in the details

### When Things Get Tense:

Allow them time to process, avoid becoming forceful or emotional

## INTERACTING WITH THE STEADINESS STYLE

### When Trying to Connect:

Show warmth, take an easygoing approach, be collaborative

### Strategies:

- Use a casual and low-pressure approach
- Show warmth and sincerity
- Present information in a step-by-step manner
- Allow them space and time to process information
- Provide reassurance

### Emphasize:

- Ongoing support
- Examples from the past
- Stability and security
- Warranties, service plans, and guarantees

### When Problems Need to be Solved:

Respect their caution, acknowledge people's needs, agree on a timeline

### When Things Get Tense:

Practice patience and diplomacy to avoid shutting them down

# Professional Readiness for Critical Conversations



**Determine the best time and place for this conversation. Evaluate the pros and cons of your options, as well as the factors that may influence everyone's mindset and engagement.**

## TIMING

What is the ideal time to initiate this discussion? Consider the **best day of the week** and **time of day** to ensure everyone is in the right headspace for a productive conversation.

## METHOD

In-person, virtual meeting, phone conversation, text, messaging platform, email, group communication, etc.

## LOCATION/ENVIRONMENT

Private setting, public setting, group meeting, onsite, offsite, your office, their office, neutral space.

**Create a loose outline for how you want to facilitate the discussion.**

*How will I:*

**Initiate and set the stage** for the discussion?

**Facilitate the dialogue** in a way that keeps it focused, respectful, and productive?

**Move the conversation into action** with clear agreements, deliverables, and timelines for follow-up?

## CONSIDERATIONS

### SHARING YOUR PERSPECTIVE

Using logic and reason, engage in a discussion about what is happening and why.

1. *What will I say?*
2. *How will I say it?*

- word choice
- tone, pace, pitch, volume
- facial expressions
- body language
- physical energy



### INVITING THEIR PERSPECTIVE

The goal is to get all relevant information out into the open, including opinions, concerns, data, facts, and ideas.

1. *How will I invite their thoughts, observations, concerns, stories, and relevant information?*
2. *What questions will I ask?*
3. *Why am I asking them?*  
*What do I want to achieve?*
  - gain insight
  - deepen understanding
  - gather information
  - encourage strategic thinking
  - ensure they feel heard and understood
4. *How will I ask them?*

### ANTICIPATING CONCERNS

*What concerns or objections might they have, and how will I address or respond to them?*

### PREPARING FOR 'TESTING'

*How will I invite opposing views and model healthy disagreement by playing devil's advocate with all perspectives shared, including my own?*

### CREATING THE CONDITIONS FOR TRUST TO EXIST

*How will I establish and maintain trust throughout the conversation? How will I reinforce mutual purpose and demonstrate balanced respect and empathy as the conversation unfolds?*

## FACILITATION

# 4 FACILITATE OPEN AND EFFECTIVE DIALOGUE

Move through the dialogue using the following three actions.

## 1 SHARE YOUR PERSPECTIVE

### Be Firm | Speak With Confidence

- Use logic and reason to explain what you're seeing or feeling and why it matters.
- Speak with confidence and stay grounded.
- Ensure your verbal and nonverbal communication is aligned, intentional, and consistent.

### But Talk Tentatively

- Share your perspective as a story, and resist presenting it as fact or verdict.
- Avoid absolute language or inflated terms.
- Your tone should signal openness, not certainty.

### Be Transparent and Appropriately Vulnerable

- Share your intentions openly.
- Let them see your humanity. It strengthens connection and lowers defensiveness.

## 2 ASK FOR THEIR PERSPECTIVE

### Seek To Understand

- Seek to understand before seeking to be understood.
- Be inquisitive and genuinely curious.
- Listen, be patient, and allow space for processing.
- Replace judgment with sincere empathy.

Use these micro-skills to deepen understanding:

- **Ask calibrated questions** to guide the conversation.
- **Mirror** to acknowledge and confirm feelings.
- **Paraphrase** to demonstrate understanding.
- **Prime** when they're hesitant — offer a thoughtful guess to help them open up.

## 3 ENCOURAGE TESTING

**Invite participants to challenge ideas, including your own, and actively play out each perspective.**

Walk ideas forward to explore assumptions, risks, and implications.

This helps everyone think through the options from beginning to end, strengthens the quality of the discussion, and increases shared ownership of the final decision.



The goal is to bring all relevant information into the open, including facts, opinions, concerns, ideas, and data. Doing this well creates shared understanding, increases the collective IQ of the conversation, leads to more informed decision-making, and increases the likelihood of buy-in.

Throughout the dialogue, maintain emotional composure and safety.

## Do Not Mirror Unproductive Emotions

- Stay calm, steady, and professional.
- Maintain direct eye contact and keep your body language open and grounded.
- As views are shared, look for opportunities to:
  - Agree:** acknowledge shared or similar views
  - Build:** add insights that expand the conversation
  - Compare:** explore differences without implying they're wrong

## Adapt Based on the DiSC Styles Present

Adjust your pace, tone, level of detail, and emotional energy to meet others where they are. People act in alignment with what they believe is in their best interest. Your adaptability helps them stay engaged.

## Create Space for Correction and "No"

Subtly provide opportunities for them to clarify, correct, or disagree. This reduces resistance, increases trust, and helps them feel respected and in control.

## FACILITATION

# 5 NOTICE THREATS TO SAFETY AND RESTORE STABILITY

Psychological safety is essential for productive dialogue. When safety breaks down, people shift into silence or escalation. When you see these signs, pause the content and restore safety before continuing.

## SIGNS SAFETY IS AT RISK

### SILENCE (*purposely withholding*)

- **Masking:** softening or selectively sharing
- **Avoiding:** steering away from sensitive topics
- **Withdrawing:** disengaging or shutting down

### ESCALATION (*attempting to convince or compel*)

- **Controlling:** pushing or coercing others toward your way of thinking
- **Labeling:** dismissing people or ideas with stereotypes or categories
- **Attacking:** making the other person suffer (emotionally or verbally)

**When one or more of these signs appear, pause the conversation and address safety immediately.**

## HOW TO RESTORE SAFETY

### APOLOGIZE

Offer a sincere apology (*when appropriate*) for your role in contributing to the reaction or misunderstanding. This isn't about taking blame. It's about acknowledging impact.

### USE A CONTRAST STATEMENT

Clarify what you *don't* intend and what you *do* intend to correct misunderstandings and reduce defensiveness. Example: "What I don't want is for you to feel criticized. What I do want is to talk through one part that needs improvement."

### CREATE A MUTUAL PURPOSE

Re-establish a shared goal. Separate tactics from the larger purpose, elevate to a higher-level goal if needed, and collaborate on a path forward.

### RETURN TO THE DIALOGUE

Once emotions settle and safety is restored, guide the conversation back to the original topic with calmness and clarity.

**FACILITATION****6 TRANSLATE DIALOGUE INTO CLEAR ACTION**

The purpose of this step is to turn the conversation into specific, agreed-upon action. Clarity prevents confusion, reduces rework, and increases accountability.

**Choose the decision-making method that best fits the situation.**

**COMMAND**

A decision is made without involving others.

**CONSULT**

Input is gathered from the group. Then, a subset makes the final decision.

**VOTE**

An agreed-upon percentage determines the outcome.

**CONSENSUS**

Everyone comes to an agreement and aligns behind the final decision.

**QUESTIONS TO CONSIDER**

1. *Who will be affected and who wants to be involved?*
2. *Who has the expertise or information needed?*
3. *Whose cooperation or authority will be required?*
4. *How many people is it worth involving?*
5. *Do others need to be included to gain commitment?*

**DISCUSS, AGREE ON, AND ARTICULATE DELIVERABLES**

- ✓ **Who?**
- ✓ **Does What?** Be specific. Ambiguity is the enemy of execution.
- ✓ **By When?**
- ✓ **What will follow-up look like?**

Document commitments immediately to prevent drift.

**ASSESSMENT****7 REFLECT AND REFINE**

**Set aside any emotional attachment to the conversation or outcome, and evaluate the interaction objectively based on what actually happened.**

**1** *What went well and why?* Identify what worked and how you can leverage it in future conversations.

**2** *What could have gone better and why?* Capture key learnings and insights.

**3** *What will I do differently next time?* Commit to one or two specific adjustments.